Test Team

NEW LOOK

20062014

Creating Filters

Guide Title

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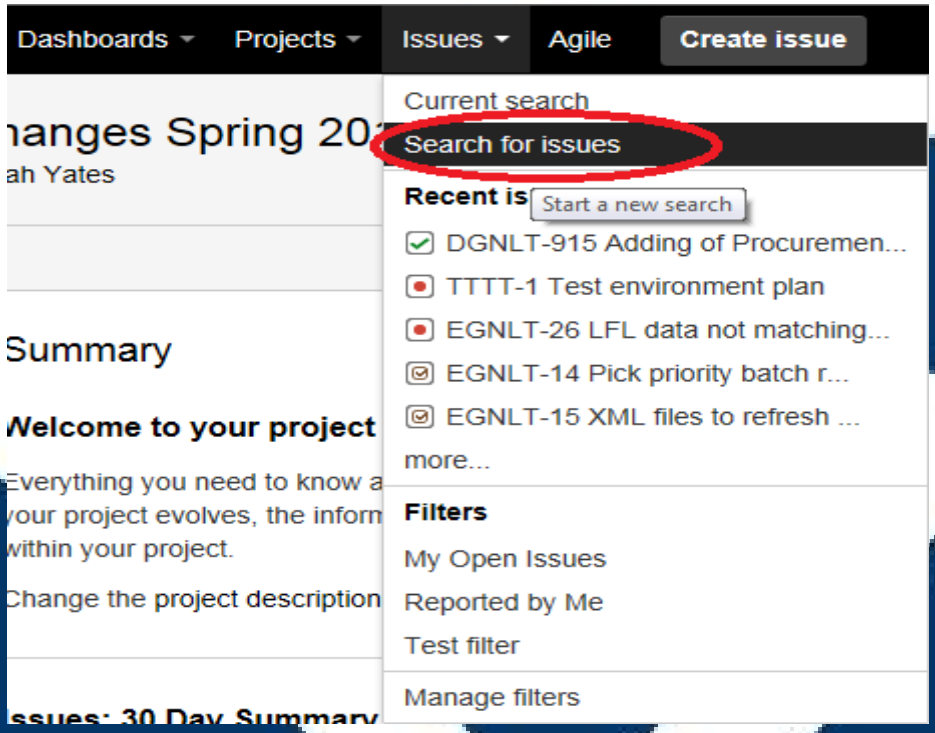
Introduction

This document will explain how to Create, edit, share and change ownership to Filters in a specific project

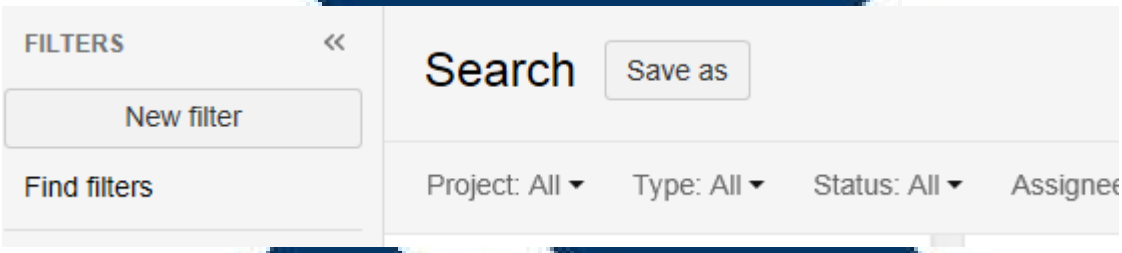
A Filter is a saved issue search. Jira users can create and manage their own filters.

Steps

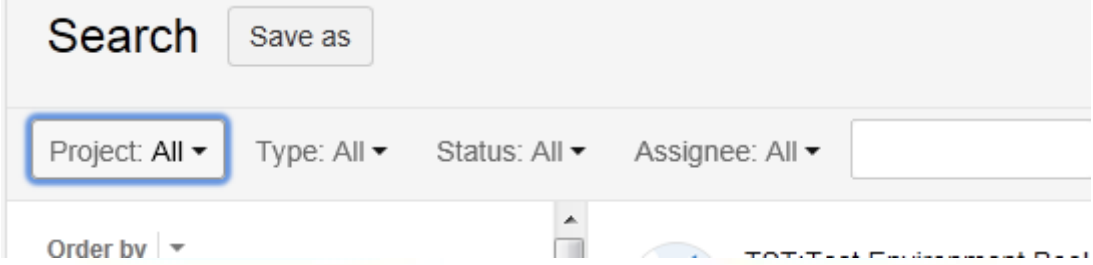
1 Log into your JIRA account. Select the **Issues** tab from the top menu. From the drop-down menu, choose **Search for Issues**



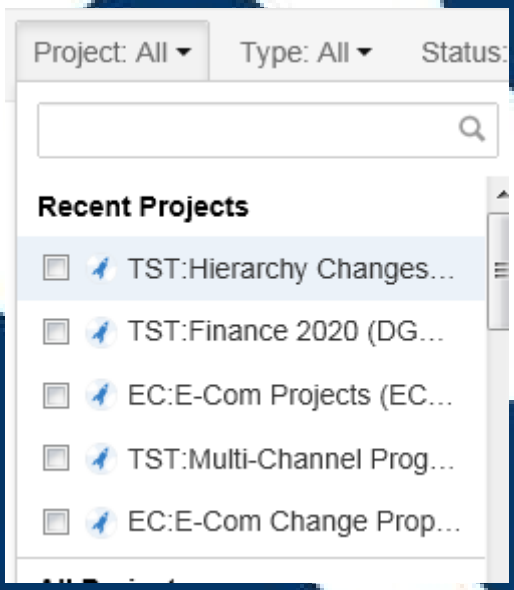
2 To create a new filter, click on New Filter button on the top left hand corner of the page



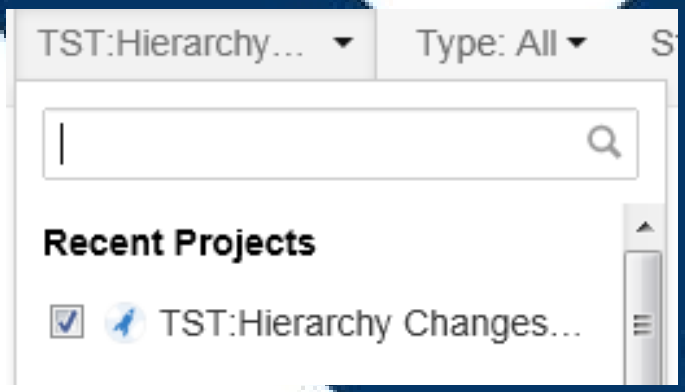
3 Project button will get highlighted in blue with “All” field option



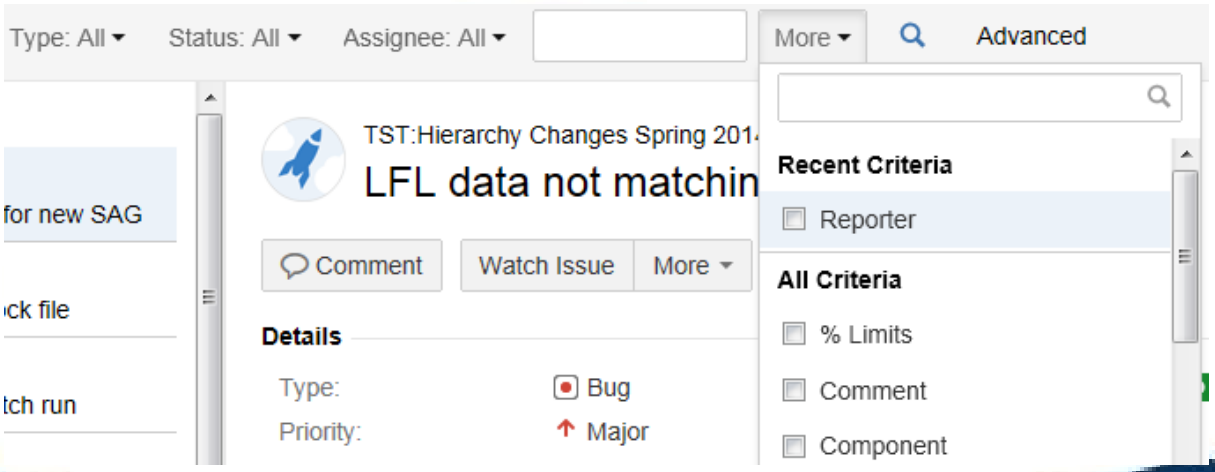
4 Click on the dropdown button to choose the project for which filter needs to be created



5 Chose the project by ticking against it and the value against Project option will change from All to your specific project

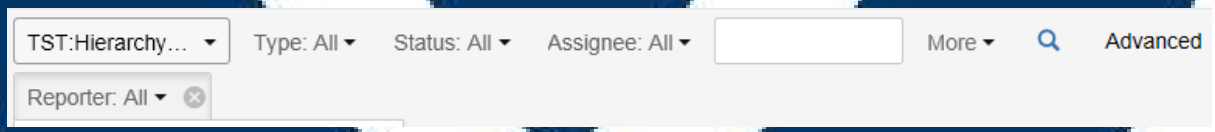


6 The filters Type, Status, Assignee is shown by default, however many options can be chosen by clicking on More dropdown and clicking on the options you want to add for the filters.



7 When ticked on the options, the filter will appear on the screen,

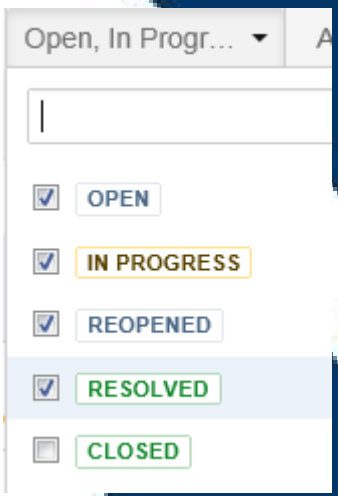
Example: I have chosen Reporter option and it is shown on the screen as below



Reporter is a compulsory filtering attribute for most of the projects.

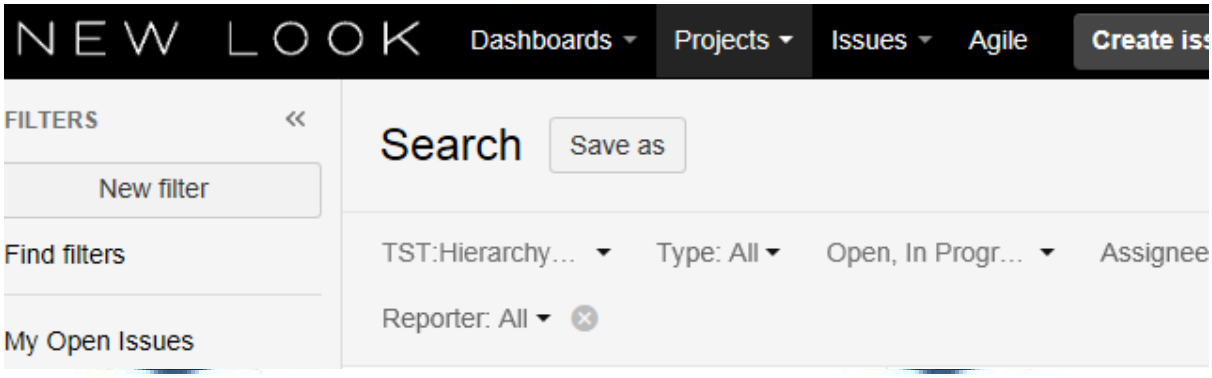
Choosing Attributes

- Reporter: All
- Assignee : All
- Status : Choose all status apart from Any and closed.

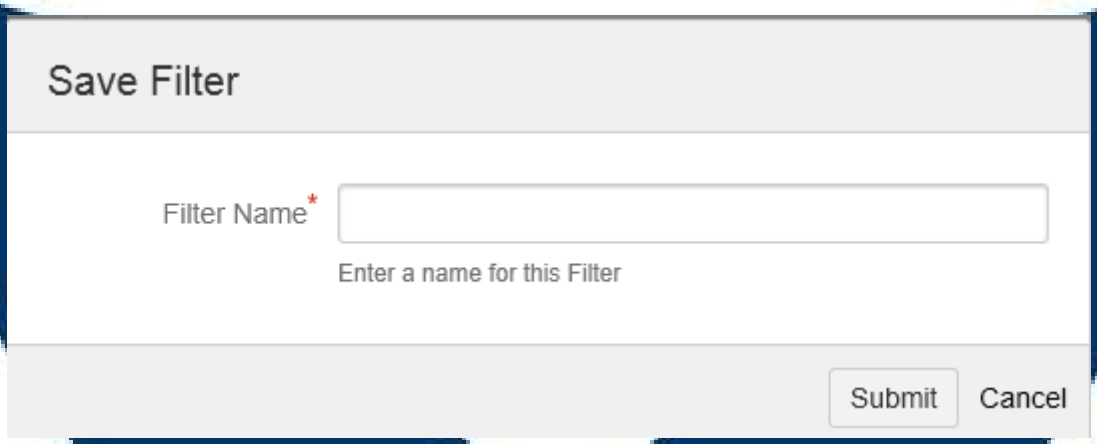


Note: **If you want to report on weekly or fortnightly, then Dates and time has to be selected from More option dropdown.**

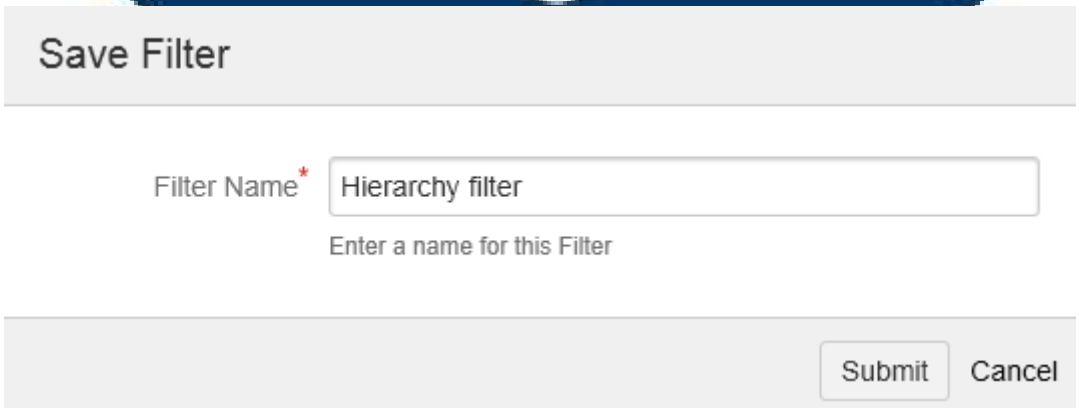
8 Click on the Save as button located next to the Search button



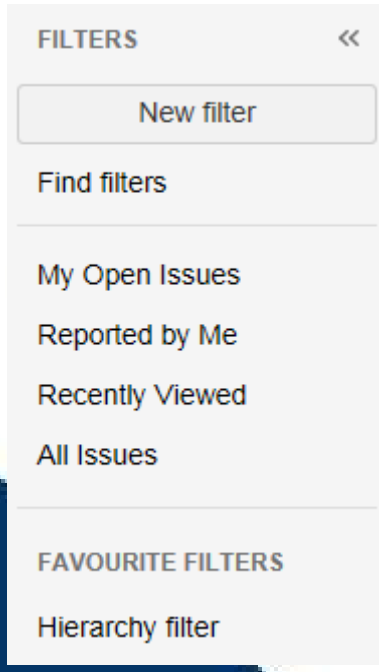
9 A pop-up window will appear allowing you to Save the Filter with the attributes you have selected.



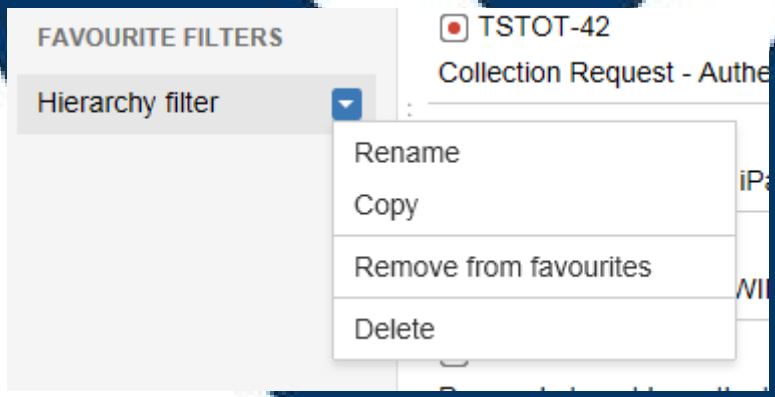
10 Give a relevant name to the filter and click on Submit option



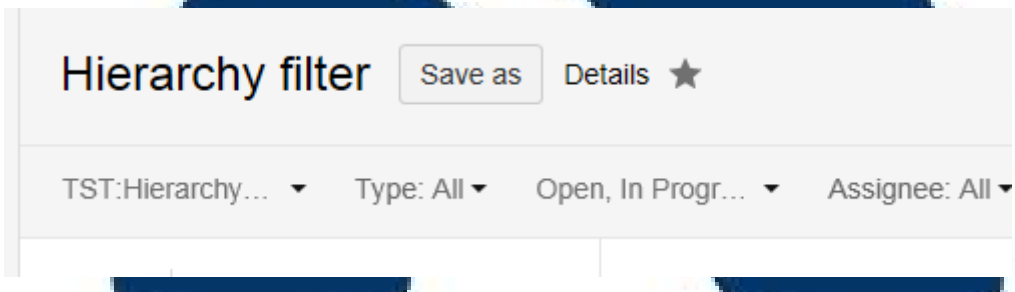
11 The Saved filter will appear in Favourite Filters option on the left hand side menu of the screen



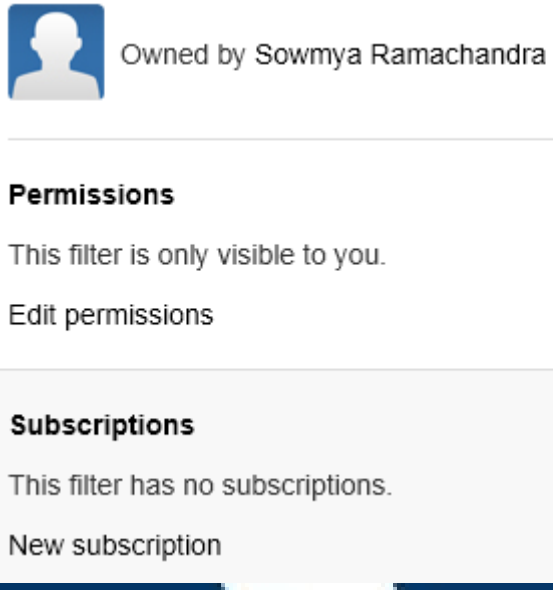
12 The filter can be copied, re-named, delete, removed from favourites



13 At this point, the Filter will be only visible to you. In order for the filter to be visible to other
members of project team or give access to certain members of the team , click on filter which is on your Favourite filters section.
Details option next to the filter will be shown as below:

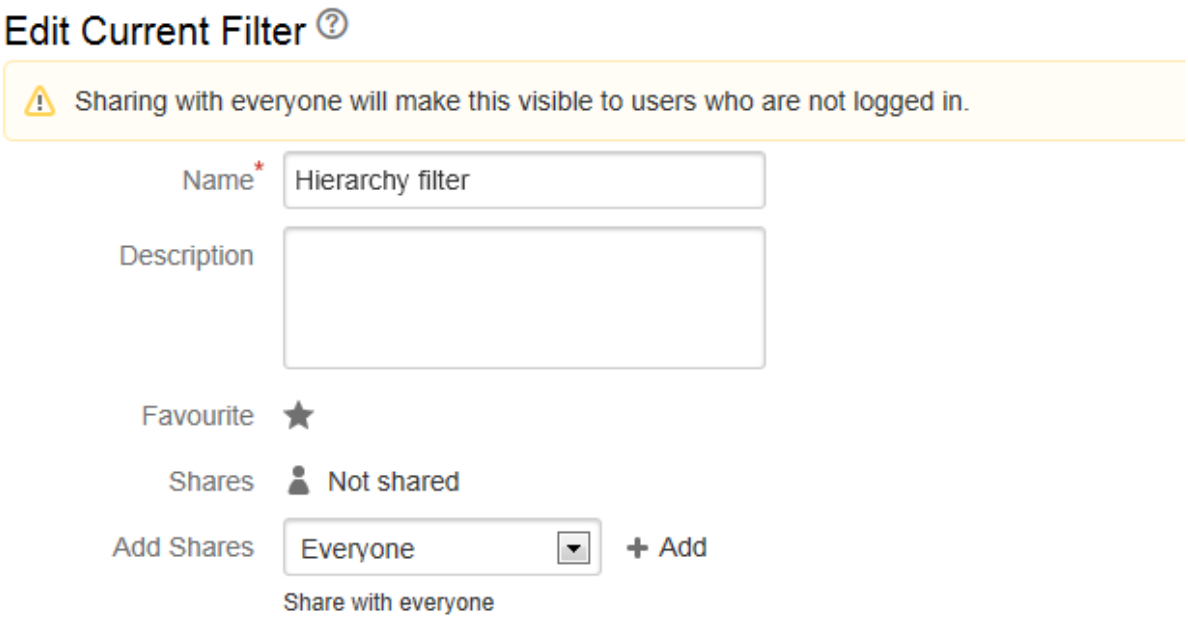


Click on Details option and choose Edit permissions

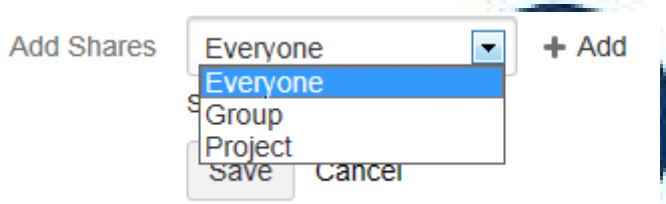


Edit Filters

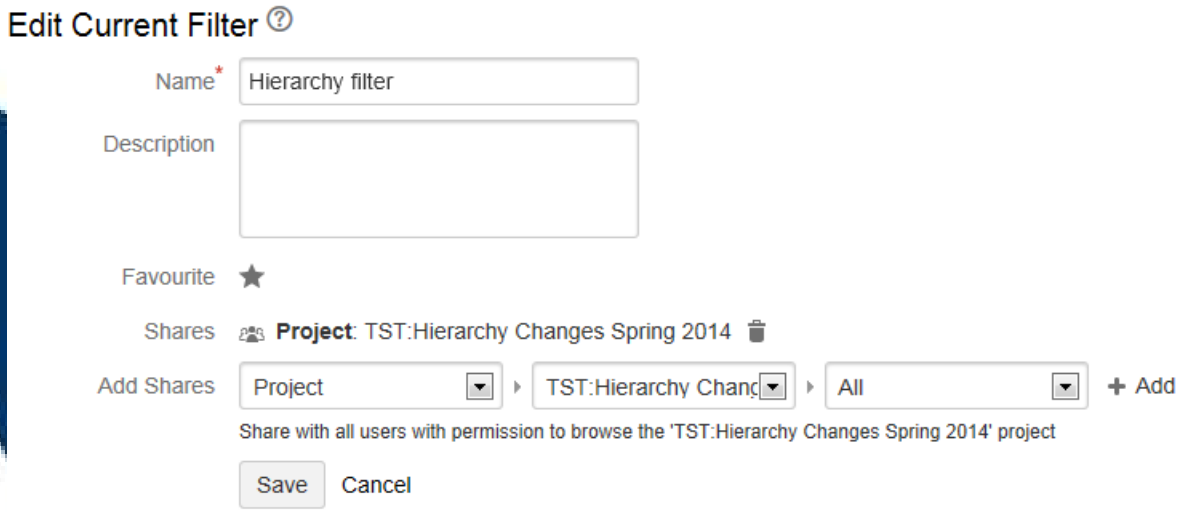
14 Edit Current Filter page will open



Click on Add Shares dropdown option and choose the project or the Group that you need to be added.

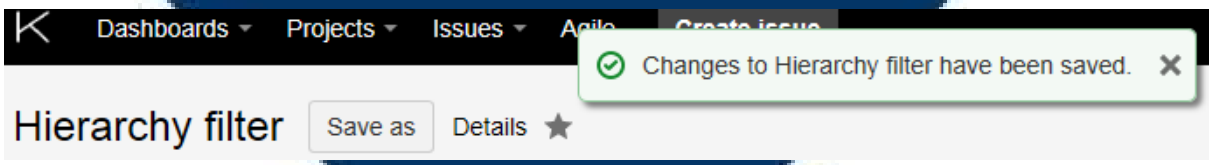


15 If you choose to Share only to particular project, then an option will be given to choose the project name. Later click on 'Add.' Save the filter.



A pop-up will appear as shown below

Note: It is better to Share the filter with everyone.



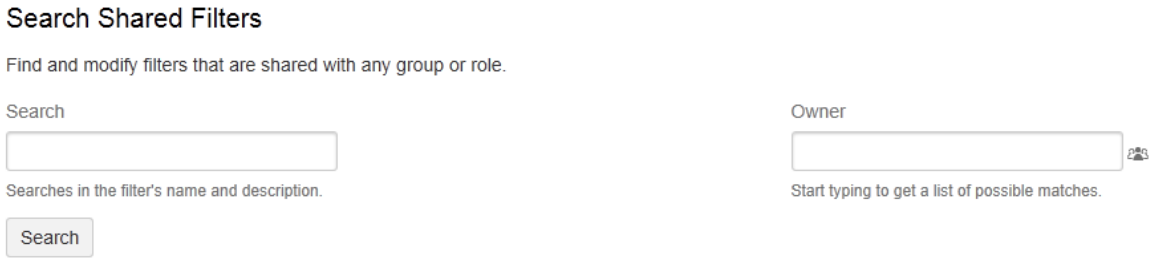
Changing the Ownership of a Shared Filter

Only Jira administrators can change the ownership of any user's shared filter, which allows the shared filter to be edited and modified by its new owner.

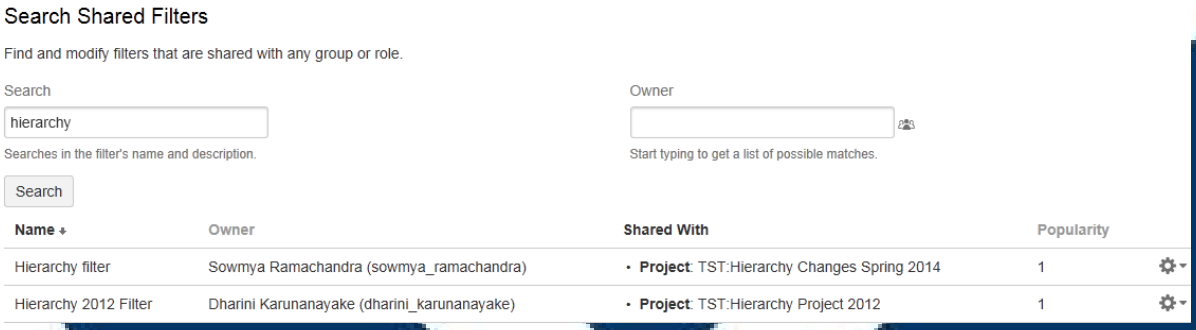
Steps

1. Log in as a user with the Jira Administrators global permission
2. Choose > **User Management**. Select **Shared Filters** to open the **Search Shared Filters** page.

Under the Search option, input the name of the filter that has to be searched


Search Shared Filters
Find and modify filters that are shared with any group or role.
Search
Searches in the filter's name and description.
Owner
Start typing to get a list of possible matches.
Search

3. Search results will be shown as below:



4. Click on the cog next to the right of the shared filter whose ownership you wish to change and select '**Change Owner**'.

5. Change Owner pop window will be shown, allowing the user to change the owner.